

The Rundown

By: CLEARPATH ACTION



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ClearPath Action Rundown January 24th, 2025

Happy Friday!



Doug Burgum

U.S. Department of Interior



Chris Wright

U.S. Department of Energy



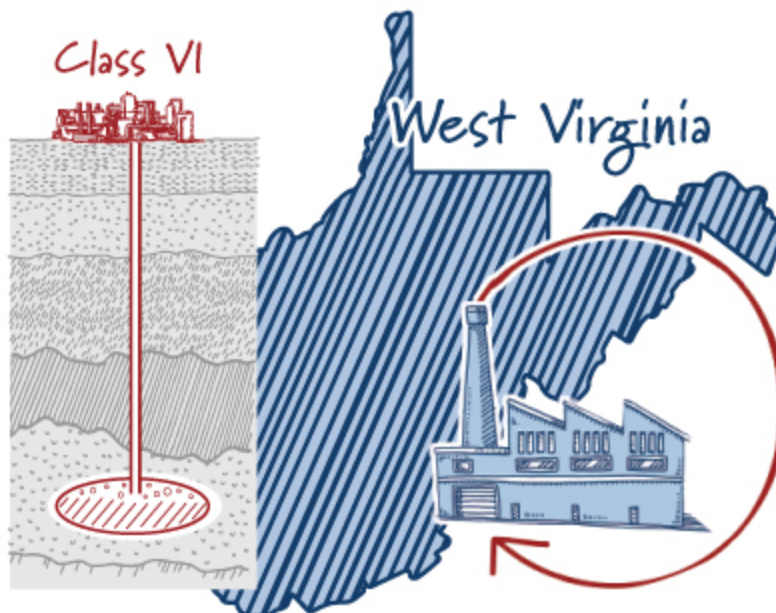
Lee Zeldin

U.S. Environmental Protection Agency

Congratulations to Doug Burgum, Chris Wright & Lee Zeldin on receiving bipartisan U.S. Senate Committee approvals!

And congratulations to **Alex Fitzsimmons**, formerly of ClearPath, for taking the role as Chief of Staff at the U.S. Department of Energy!

1. West Virginia granted Class VI primacy



West Virginia is the fourth state to be granted Class VI primacy. Last week, EPW Chair Capito (R-WV) **announced** the Environmental Protection Agency (EPA) approved West Virginia's Class VI primacy application, allowing the W.V. Department of Environmental Protection to permit Class VI wells in the state. Class VI primacy:

- Has proven to be an effective tool for streamlining the permitting process for Class VI wells – enabling states to review and approve carbon storage permits in a matter of months; and
- Is key for unlocking carbon storage infrastructure and deploying carbon management technologies broadly.

Seven other states have begun early application activities to receive Class VI primacy. The EPA is reviewing over 60 well applications in these states for 20 carbon storage projects. Granting states Class VI primacy is key to permitting these projects efficiently and getting steel in the ground.

What's clear: "Carbon capture, utilization, and storage is essential to protecting our ability to provide reliable, baseload power in West Virginia through coal and natural gas while reducing our power and manufacturing sector emissions," **said Chair Capito.**

2. GE Hitachi's BWRX-300 accelerates SMR deployment



GE Hitachi's BWRX-300 could soon be deployed in Tennessee, Indiana and North Carolina. A coalition led by the Tennessee Valley Authority (TVA) applied for \$800 million in funding from DOE's U.S. Gen III+ small modular reactor (SMR) technology grant. If awarded, TVA plans to accelerate construction of the SMR at its Clinch River site by two years with commercial operation planned for 2033.

Along with TVA, this group includes Duke Energy Corporation, Bechtel Corporation, BWX Technologies, Inc. (BWXT), Electric Power Research Institute (EPRI), GE Hitachi and others.

In addition:

- Duke Energy entered an agreement with GE Hitachi to advance BWRX-300 SMR design and licensing.
- American Electric Power (AEP) selected the BWRX-300 as its preferred SMR to be deployed at an existing power plant site in Indiana.

What's clear: Developers and utilities are collaborating to accelerate SMR deployment while sharing risk and knowledge to reduce delays and costs. The BWRX-300 will serve as a valuable reference for developers providing insights and lessons learned for future reactor deployments.

Plug in: Read more about how addressing uncertainty and perceived risk will allow companies to invest in the supply chains and workforce with the [Accelerating Reliable Capacity Act](#).

3. Interest in restarting V.C. Summer Nuclear Station



South Carolina utility Santee Cooper **is looking for a buyer** for the partially built V.C. Summer nuclear power plant. The completed Westinghouse AP1000 reactors would be capable of generating more than 2,200 megawatts of nuclear power. This announcement follows an emerging interest in large reactors.

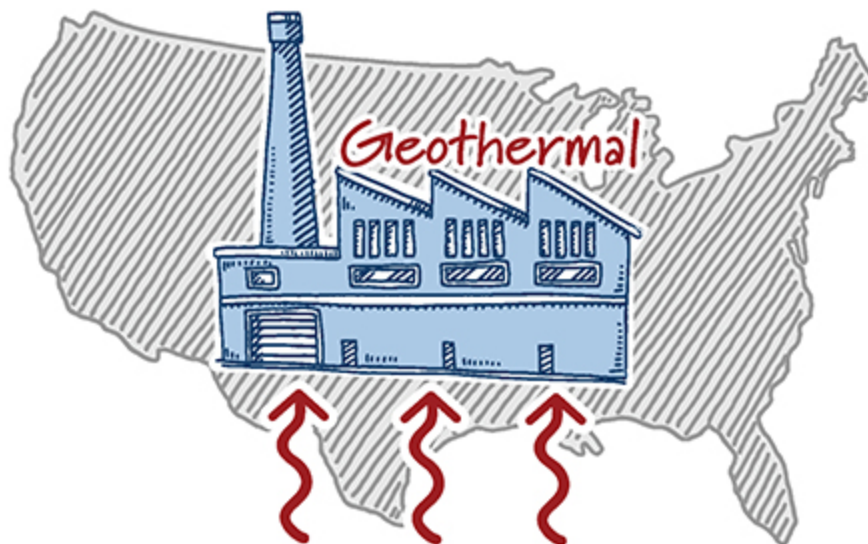
New life to nuclear:

- **Vogtle:** Units 3 and 4 came online in 2023 and 2024, respectively.
- **Diablo Canyon:** The plant was saved from shutdown when it received support from bipartisan infrastructure law to remain operational.
- **Palisades:** The Michigan nuclear plant received a federal loan year to reopen.
- **Three Mile Island:** Constellation Energy and Microsoft partnered to reopen Unit 1.
- **Daune Arnold:** This Iowa nuclear plant is considering reopening.
- **V.C. Summer:** Currently seeking buyers to complete construction on two reactors.

What's clear: As the demand for energy from data and AI centers increases, tech companies are looking to nuclear energy as a source of 24/7 clean power.

Plug in: In the *Washington Examiner*, ClearPath CEO Jeremy Harrell co-authored an **op-ed** with Rep. Bob Latta (R-OH) on investing in and advancing nuclear energy to ensure Americans' growing demands are met with reliable, affordable and clean energy.

4. Interior finalizes additional geothermal CatEx

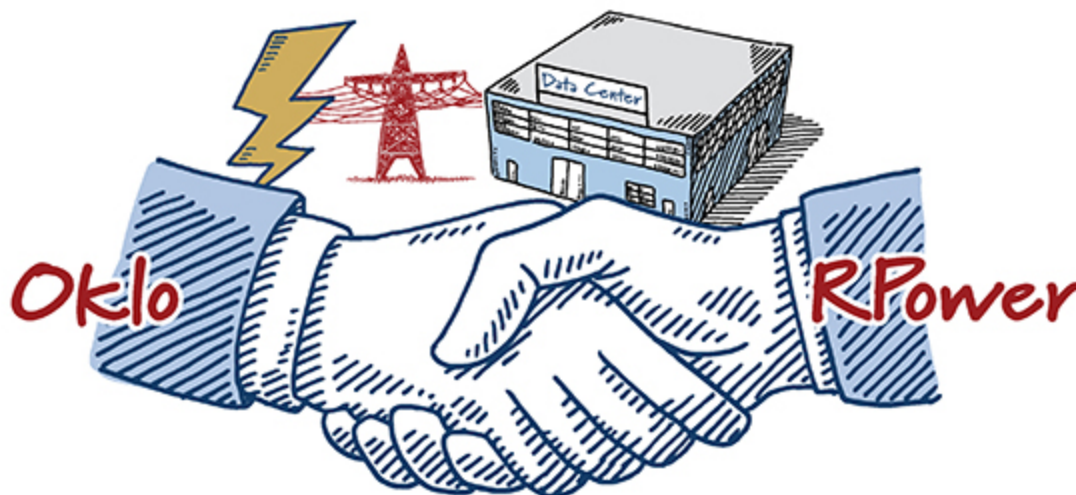


The Bureau of Land Management (BLM) **finalized a rulemaking** to create a new categorical exclusion (CX) for geothermal resource confirmation. This builds on previously adopted authorities from the Fiscal Responsibility Act championed by House Republicans in 2023.

The latest CX mirrors bipartisan legislation introduced by Congress to equalize the playing field for oil & gas activities on Federal geothermal resource leases for geothermal activities up to 20 acres of surface disturbance. This categorical exclusion:

- Has bipartisan congressional support;
- Will help deploy more 24/7 clean, reliable energy; and
- Will lead the way for geothermal to meet growing demand for AI and data centers.

5. Oklo and RPower's unique power availability



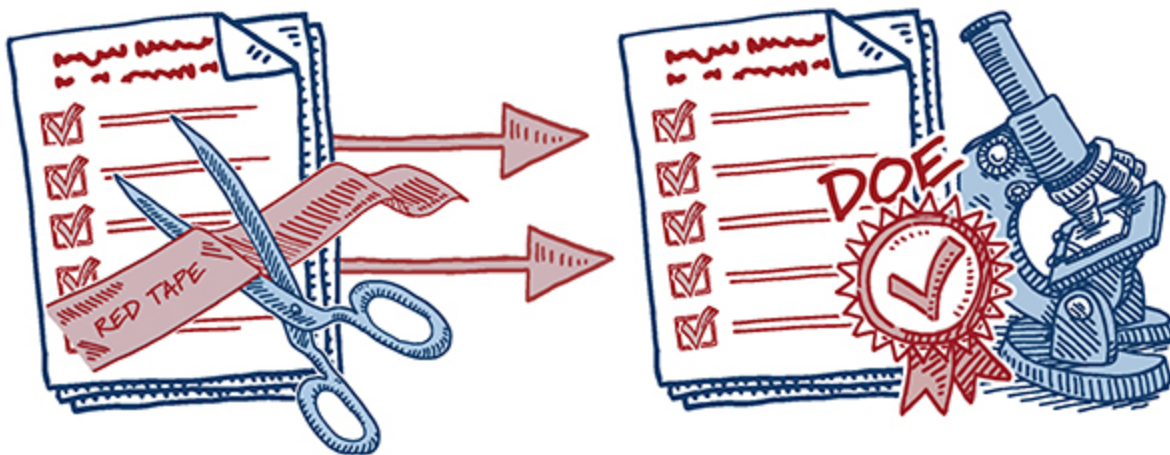
Oklo and RPower **are partnering** on a phased energy approach for data centers. Natural gas generators meet immediate power demands for data centers and move

to a backup role when Oklo's Aurora Powerhouse is deployed to provide long-term, clean energy.

- This is a first-of-a-kind phased energy approach involving a nuclear developer.
- Oklo's first deployment of the Aurora Powerhouse is planned for late 2027 at Idaho National Lab.
- Oklo **aims to deploy 12 GW** of nuclear power for data centers through 2044.

What's clear: Unique partnerships like this can accelerate the deployment of nuclear reactors to meet the critical energy needs of data centers. This approach addresses immediate power requirements of these centers while simultaneously advancing commercialization of clean, firm, 24/7 nuclear power.

6. Unleashing American clean energy innovation



Recent executive orders could lead to accelerated clean energy deployment. The bipartisan Infrastructure Investment and Jobs Act (IIJA) included funding for innovative, clean energy technologies such as advanced nuclear, geothermal, carbon capture and industrial projects, yet only 12% of what Congress appropriated to the Department of Energy (DOE) in 2021 has gone to American energy developers.

Some quick topline spending data as of Jan. 10, 2025 from [ClearPath's Infrastructure Tracker](#):

- \$63 billion in appropriated funds to DOE for energy innovation from Congress in the IIJA.
- \$43 billion in announced awards from DOE.
- \$13 billion (20%) of awards have completed negotiations with signed, contractually obligated funds to project developers.
- \$7.8 billion (12%) is out the door as outlaid on the federal government's books.

What's clear: Many delays stem from new requirements introduced by the Biden administration, such as Justice40, DEI initiatives, or community benefit plans. These additional layers slowed negotiations and were unrelated to the technical or

economic success of the projects. As the Trump administration staffs up and reviews these projects it could implement a more streamlined process to help unleash American energy and approve projects faster.

7. Republicans accelerating American energy leadership



President Trump's first administration started to make American energy dominant in all forms of energy. The private sector needs all tools available, including tax credits and faster permitting, for this Administration to meet rapidly increasing electricity demand and have America lead in new technologies.

U.S. global energy leadership requires prioritizing innovation over regulation and incentives for new clean energy technologies rather than new taxes on American energy production.

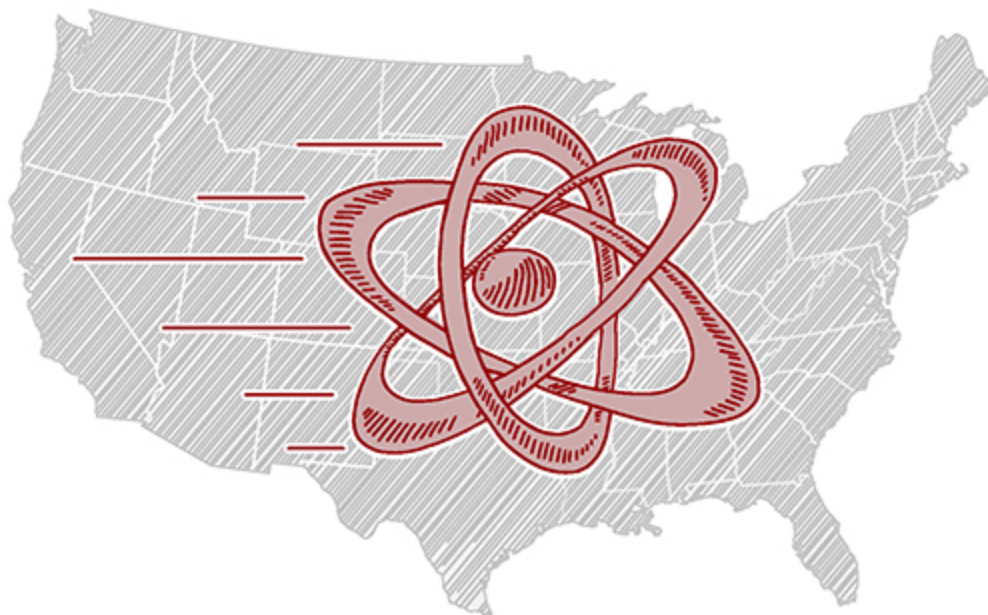
House **Republicans outlined their tax priorities, offered vocal support for** including federal tax incentives that play an important role in accelerating new American innovation to reduce global emissions at the House Ways & Means member day hearing on Wednesday.

Incentives like...

- 45Q: carbon sequestration credit;
- 45Y/48E: clean electricity production credit and investment credit; and
- 45X: advanced manufacturing credit...

...can help the Administration achieve American energy leadership.

8. NEW blog: Five States to Watch for New Nuclear



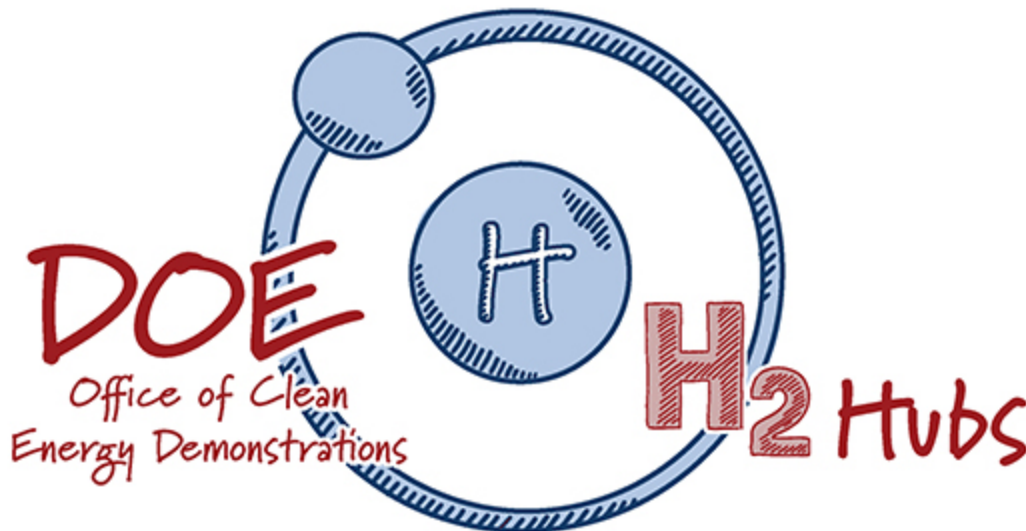
U.S. power use is projected to hit **record highs** in 2024 and 2025, with electricity demand expected to **rise 9% by 2028**. Several states are deciding to act now by positioning nuclear as a key solution to meet growing needs and attract investment.

- **Indiana:** Governor Mike Braun released his **Freedom and Opportunity Agenda**, which includes support for advanced nuclear power in the state.
- **Tennessee:** Tennessee is advancing nuclear innovation by leveraging Oak Ridge National Laboratory (ORNL) and strategic partnerships.
- **Texas:** Texas released a **landmark report** in response to Gov. Greg Abbott's 2023 directive to the Public Utility Commission of Texas (PUCT).
- **Utah:** Gov. Spencer Cox is driving nuclear innovation with his 2025 budget announcement, prioritizing site identification, permitting readiness and creating the infrastructure and economic ecosystem needed to enable nuclear leadership.
- **Virginia:** Virginia's load growth is projected to double by 2039, **the highest electricity demand in the nation**, prompting Governor Youngkin to create a strategic nuclear energy plan and Clean Energy Innovation Bank.

What's clear: While federal policy drives broad nuclear innovation, states play a critical role in actually building nuclear generation infrastructure. The U.S. has seen early mover states collaborate with tech companies and utilities to streamline permitting, reduce delays and support early-site preparation. This state-level action allows project concepts to become reality.

Plug in: Learn more about what these states are working on in our **latest blog** by ClearPath fellow Bryson Roberson and Hannah Devereaux.

9. Green light for Regional Clean Hydrogen Hubs



DOE's Office of Clean Energy Demonstrations (OCED) completed award negotiations with both the Heartland and Mid-Atlantic Regional Clean Hydrogen Hubs on January 17th for up to \$1.6B.

- The finalization of these awards allows each hub to begin Phase I of hub development which includes foundational activities.
- Last year: The Appalachian, Californian, Pacific Northwest, Gulf Coast and Midwest Regional Clean Hydrogen Hubs finalized award negotiations.

What's clear: The **Regional Clean Hydrogen Hubs** are part of the Bipartisan Infrastructure Law and can increase American energy, support national security, tackle emissions from difficult-to-decarbonize sectors and bolster local economies.

Plug In: Learn more about the advantages of clean hydrogen in CEO Jeremy Harrell's [op-ed](#).

10. ICYMI

- TED Talk: **"I'm a conservative — and I care about the climate, too."** Tune in to American Conservation Coalition's CEO, Danielle Butcher Franz.
 - Reshoring chemical manufacturing and refining is key to solving the global climate challenge. **Check out our newest webpage** to learn more.
 - **TerraPower & Sabey Data Centers** sign MOU to build new nuclear plants.
 - OCED **announces** up to \$1.8B for scaling direct air capture technologies.
 - DOE shares projects receiving **clean energy manufacturing** investments.
 - **2024 clean energy manufacturing investments:** \$39 billion for 216 facilities – Indiana led with the highest total announced investment, followed by South Carolina and Georgia.
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ClearPath believes America must lead the world in innovation over regulation... markets over mandates...providing affordable, reliable, clean energy.

That's all from us. Thanks for reading and have a great weekend!

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